Inland Revenue
Te Tari Taake

Business Transformation

Inland Revenue

Business Transformation Programme

Internal Communications Plan for Stage 4 START Delivery

Senior Responsible Officer

Prepared by:	Redact
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About this document

This plan sets out the internal communications approach and activities for Business Transformation Stage 4, Workstream 1: START Delivery for the period July 2020 to December 2021. This plan should be read in conjunction with the Stakeholder Engagement Plan for Stage 4. The activities detailed in this plan will ensure IR's people understand, support and do what's needed to enable the transformation.

The plan provides guidance for:

- The Executive Leadership Team and Business Group Leadership Teams.

- The Business Transformation Programme including the Communications and Stakeholder Management team, the Organisation Change team, the Account Management Team, Digital Services team, Product Owners and the Programme Leadership Team.

- IR Marketing and Communications teams including Internal Communications, Marketing and Media.

- The Stakeholder Relations and External Relationship teams.

This document is a point in time and our plans will be strengthened as we work closely with our internal stakeholders.

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Inland Revenue
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Business Transformation

Formal Review Area	Name/Title	Signature	Date
Responsible Person	• Communications and Stakeholder Management Lead		
Accountable Person	• Stage 4, Workstream 1, START Delivery Programme Manager		
The following people and groups have been Consulted	• Organisational Change Management and Training Lead • Product Manager, Child Support • Product Owner, Paid Parental Leave • Product Owner, New Zealand Foreign Trusts, Unclaimed Monies, Duties, Student Loans • Product Owner, Tax on Income • Product Owner, KiwiSaver • Digital Channel Owner • Manager Internal Communications		
The following people have been Informed	• Segment Lead, Capability & Outcomes • Integration Lead, CCS • Segment Lead, CCS-I Individuals • Segment Lead, CCS-I Families • Segment Lead, CCS-I Community Compliance • Segment Lead, International Revenue Strategy		

Contents

1   Executive Summary

This plan sets out the internal communications approach and activities for Business Transformation Stage 4 Workstream 1 (START Delivery) for the period July 2020 to December 2021. The activities detailed in this plan will ensure IR's people understand, support and take the appropriate actions required to enable the transformation.

This document is a point in time and our plans will be strengthened as we work closely with our internal stakeholders.

There will also be a separate communications plan for go-live and early life support.

This plan should be read in conjunction with:

- Stage 4 START Delivery Stakeholder Engagement Plan.

- Stage 4 START Delivery Customer Communications and Marketing Plans, to be developed later in the year in conjunction with IR Marketing and Communications.

1.1   About Inland Revenue

IR is an organisation of around 5,000 staff dispersed across 17 cities and towns in New Zealand.

IR collects 80% of the revenue that the New Zealand Government needs to fund the country.

In the 2018-2019 financial year Inland Revenue;

- We collected approximately $113M from duties in 2019.

- We have approximately 2,500 active New Zealand Foreign Trusts registered with IR.

- We received just under $13 million in Unclaimed Monies and paid out $1.4 million.

- We collected $471 million from more than 164,000 parents who pay child support. We distributed $290 million to receiving carers.

- We made $367 million paid parental leave payments to 66,923 parents.

1.2   About Business Transformation

Business Transformation (BT) is a multi-year, multi-stage change programme that will help IR become the modern world-class revenue organisation that's set out in our vision *IR for the Future*.

It's about changing Inland Revenue to make it simpler, more open and certain for New Zealanders to pay their taxes and receive their entitlements.

The programme's objectives are:

- Improving agility so policy changes can be made in a timely and cost-effective manner.

- Delivering new and more effective services to improve customer compliance and help support the outcomes of social policies.

- Improving productivity and reducing the cost of providing our services.

- Improving the customer experience by making it easier and simpler for our taxation and social policy customers, with a particular focus on enhanced digital provision of services.

- Increasing the secure sharing of intelligence and information to improve delivery of services to New Zealanders and improve public sector performance.

- Minimising the risk of protracted system outages and intermittent systems failure.

From a functional perspective, a key aspect of the programme change is the progressive replacement of the FIRST core tax and social policy system with START. The programme also requires other significant shifts including changes to the organisation model, the introduction of supporting technology and a review of policy and legislative settings to frame and support the programme's objectives.

1.3   Business Transformation START delivery progress to date

As at June 2020, the following has been delivered:

1. Business Transformation Stage 1, delivering GST and some other functions into START including Case Manager and Customer Interaction Manager, and making GST easier for customers and making the management of GST simpler and faster for IR and the government.

2. Business Transformation Release 2 delivering the Account Income Method (AIM), voluntary Payday Filing, Withholding taxes, Fringe Benefits Taxes, Gaming Machine Duty, EMS, and imaging correspondence.

3. Business Transformation Release 3 delivering income tax, donation tax credits, Working for Families tax credits and the Customer Master from FIRST to START. Introducing new approaches to meeting tax obligations and paying tax, including a new year end assessment process for many individual income tax customers. Payday filling, optional from Release 2, became compulsory for employers.

4. Business Transformation Release 4 delivering student loans and KiwiSaver products into START and moving the end-to-end processing of employer obligations (PAYE) into START. We also implemented a number of income tax and working for family's enhancements.

1.4   START Delivery Scope for Stage 4

There are three parts to the START Delivery workstream.

- transferring the remaining products into START
- implementing new legislation, including what we need to put in place to support the government's COVID-19 response, and
- delivering optimisation initiatives (subject to prioritisation).

1.4.1   *Transferring the remaining products into START*

The products will be split into two groups – for an initial release in February or March 2021 and a later release in October 2021, which will also include the upgrade to START v12.

The earlier release, targeting 1st March 2021 will include the following products:

- Unclaimed Monies.
- Paid Parental Leave.
- Duties – including casino, lottery and totalisator duty, along with the problem gambling levy.
- New Zealand Foreign Trusts.

The later release, in October 2021 includes the following product:

- Child Support.
- START and myIR Version upgrade.
- Several smaller changes including creating the START archive

1.4.2   *New legislation, including supporting the Government's COVID-19 response*

This stream of work includes a number of known legislative changes such as Portfolio Investment Entity (PIE) income becoming refundable which will affect the 2021 auto-calc and the removal of child support incremental penalty. Also likely in this period, is legislative change as part of any incoming government's first 100 day-day plan following the September 2020 election.

Managing the response to COVID-19 is also going to continue to be a key priority for the Government for the foreseeable future.

The pandemic has had a significant impact on almost everyone in New Zealand and the Government has already introduced a wide range of measures to assist. These include the wage subsidy scheme and the Small Business Cashflow (Loan) Scheme for small to medium sized businesses, as well as several initiatives for families and individuals, particularly to help those who may have lost jobs or income.

To implement many of these initiatives, legislative changes were necessary, and experience shows us that there's likely to be more to come.

1.4.3   *Optimisation*

At the same time as we complete the implementation of the core START products, we'll look to optimise the products and processes that we have delivered through our previous releases including Tax on Income, Working for Families, KiwiSaver, Student Loans etc. Optimisation involves working with the business to pick out the things which will improve the experience for our customers and improve the efficiency of our processes.

The business will play a key role in prioritising what we can deliver in this stream. A group of leaders from across the business has been set up to provide recommendations to the Transformation Executive Working Committee (TEWC).

We expect the size of tasks will vary, with some requiring a larger, more focused delivery approach, while others can be likened to fine tuning, rather than a major change.

1.4.4   *Other*

There is also some scope which falls under "other" in Workstream 1. One of these is the KiwiSaver Future State project which is about replacing the Heritage AS2 Business to Business (B2B) gateway with Gateway Services Application Programming Interfaces (API's) between IR and the KiwiSaver providers. We're currently in the process of understanding the change impact on our people including what changes are likely to require internal communications targeting our people working on KiwiSaver.

The Annual Changes stream of work also sits in the "other" scope items.

1.5   **About Business Transformation internal engagement**

START delivery has been the major focus of the majority of our people throughout the transformation programme. We've delivered a lot of change and have used high profile, highly effective communications campaigns to capture and hold our people's attention.

Now we're at stage 4. For many of our front-line people, their perception is that with the majority of products already in deployed, BT is finished. Their work is in START, there's minimal co-existence and they are now focused on delivering their work using their new tools and capabilities and moving to the future operating model. There will be interest in what's happening in the other BT workstreams – removing FIRST user access, decommissioning and archiving (particularly what data are we retaining and disposing of), the new home base Haukāinga which will replace our intranet, a new payroll system and how the capability and processes developed by the programme will transition to the business when the programme closes (linked to the future operating model).

This means that to engage people in further changes to START, we must take a different approach to communication than in previous releases, to ensure we can capture and hold their attention where and when we need to.

1.5.1   *First Release – S4.1.R1*

The number of people directly impacted in the first release (S4.1.R1) is small. The Families segment will be deeply interested in Paid Parental Leave (PPL) and may take the opportunity to broaden out the number of people who do PPL work. Specific teams within the Individuals segment does work around unclaimed monies and duties. The International Revenue Strategy segment manage New Zealand Foreign Trusts.

Our people in the Contact Centre, Community Compliance, Significant Enterprises and External Relationships will need general awareness of the changes so they can answer simple customer enquiries and provide myIR support. We will target these groups, leveraging our technology and they will be included in our Teams Live Deep Dive events.

For the first release, our communications will be targeted and include support for business engagements led by the Product Owners and the OCMT team, with less emphasis on all-IR communications

Where our campaigns may need to become more general is in the support of Optimisation and legislative change. Our people will need to know what's happening, including what is being

worked on as well as how the customer experience is being improved and any changes to business processes and procedures.

We will make sure we have a robust plan around these communications.

1.5.2   Second Release – S4.1.R2

The second release (S4.1.R2) where we move child support into START directly impacts around 450 people in the Families Segment. Internal communication and engagement will also be required to support the ratification of the Hague Convention, which allows for maintenance to be recognised and enforced in other member countries. NZ will apply it to child and spousal support in line the second release.

At the same time, we're upgrading START and myIR to a new version - Version 12. This may feel like a big change for our people because START will look different, but it will still do all the same things and usability will be better. The bigger impact is on our customers because of changes to myIR – both how it looks and navigates - including how calls to actions are presented for all products and all customers. There is a big job to do to ensure customer-facing teams, in particular Community Compliance, Significant Enterprises and the Contact Centre, are re-engaged and empowered to help and support their customers, so we continue to drive uptake and make digital channels the preferred option for customers.

A key principle of our internal stakeholder engagement and communications is that we will 'start from the top'. We will follow this principle again for Stage 4. This means our communications campaigns will first provide people leaders with a good understanding of what is changing and why, so they can lead, coach and support their people through these changes. We will target specific leaders whose teams are impacted to ensure that they have enough information to lead their teams through the changes.

2   Internal audiences

Stage 4, Workstream 1, START Delivery, Internal key stakeholders
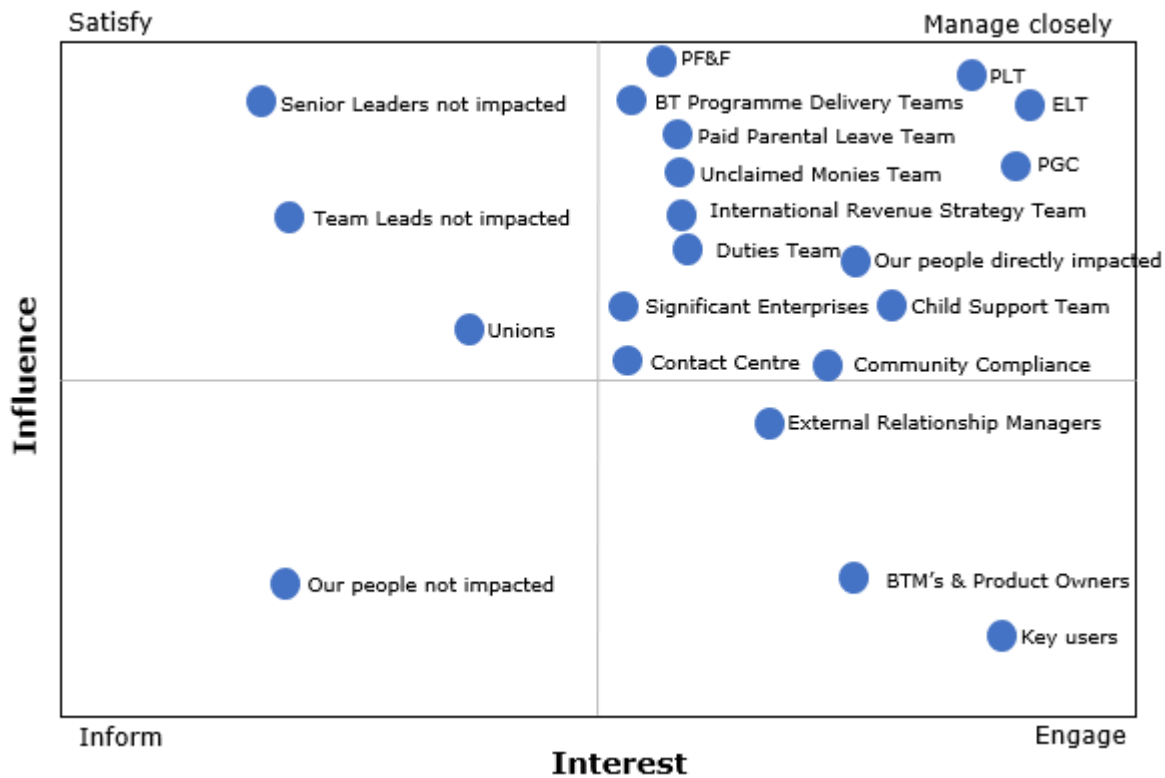
Figure 1: Internal key stakeholders

Refer to the Internal and External Stakeholder Engagement Strategy and Plan for a more detailed analysis of internal audiences.

3   Key challenges and risks

START Delivery internal communications activity seeks to overcome the following key challenges:

1. The update to START and myIR V12 brings change on change for teams who have been impacted at every release. Embedding could be difficult as people are still catching up.

2. The ongoing impacts of COVID-19 may add to our delivery scope and make engagement more difficult, and are not all known — but will include:

    • Changing priorities for our customers, affecting how we work.
    • Changes to our working environment – how and where our people work.

3. High levels of change across IR in 2020/2021, including organisation design change, can mean change fatigue and less bandwidth to focus on Stage 4.

4. Organisation design change will mean changes to teams and individuals BT depends on for stakeholder engagement, marketing and communications.

4 What's changing for our people

Stage 4 is the final step in our multi-stage transformation journey.

From a START delivery perspective, the impact on our people overall is lower than previous releases and will be felt by specific teams who do specific work.

4.1 First release impacts

Significantly fewer people are impacted in the first release (S4.1.R1) with most people requiring awareness and light touch support only so they can deal with simple customer enquiries and referrals. The way we support our people to get ready for the release can be scaled accordingly by taking an individualised approach with those most highly impacted.

- **HIGH** impact for the specialist unclaimed monies team when their work moves into START and from legislative change. All of their current processes from a holder and claimant/owner perspective will change. They will have revised guidance on how they apply their judgement to determine if the Commissioner is satisfied that the claimant is the owner before refunds can be made. The impact of legislative changes to how and when holders file UCM, the ability to use available historical data held by Inland Revenue to locate owners, and the automated publishing of the unclaimed monies list on the website is likely to generate a significantly higher volume of proactive actions and an influx of enquiries, claims, cases and refunds.

- **MEDIUM** impact for the specialist PPL team when their work moves into START and LOW impacts for employer-handling teams including CCS-Individuals (Contact Centre and Transactional processing), depending on design decisions. There is potential for a wider group of people in the Families segment or Contact Centre to undertake PPL work, including taking applications over the phone by exception. The PPL team currently provide business continuity cover for IR payroll and this will need to be revisited when they cease working in the SAP payroll system.

- **MEDIUM** impact for the small specialist duties team as automation in START will remove a significant amount of the manual work that currently exist eg manual reconciliations, validations to reduce duplicate returns and misdirected payments, automatic application of penalties and interest, credit offsets to other account types.

- **LOW - MEDIUM** impact for International Revenue Strategy and Significant Enterprises in respect of New Zealand Foreign Trusts as manual processes move into START eg digital channels for receiving and managing information and returns from trustees, validations to improve data quality and reduce manual handling, automated processing of payments and invoicing.

4.2 Second release impacts

The impact on our people will increase for the second release (S4.1.R2) with around 460 people in child support teams across 10 sites. The v12 upgrade will impact everyone who uses START to some degree, with the most impact of those people supporting customers to use myIR in Community Compliance, Significant Enterprises and the Contact Centre.

- **MEDIUM - HIGH** impacts for child support teams in the Families Segment as their work moves into START, large transactional processes are automated and as specialist functions such as international child support are integrated into core systems. Child support people will also need to understand legislative and technical changes, e.g. as a result of the Hague Convention and Child Support Amendment Bill. Our people will need to be able to support child support receiving carers and paying parents navigate and use myIR and understand the changes and choices that affect them and the children. Improved information sharing with MSD and Oranga Tamariki and extending the MSD portal for social policy purposes should make interactions with partner agencies easier.

- **HIGH** impacts for customer-facing teams who will need to support customers adjust to further myIR change, particularly Community Compliance, Significant Enterprises and the Contact Centre. v12 is the first upgrade and an opportunity to re-engage our people with START and myIR functionality with a focus on benefits to them and customers. We will look to empower our people to help customers with a better understanding of the system so they can continue to drive uptake and help customers to stick with digital channels.

- **LOW - MEDIUM** impact for all people who use START with changes to look and feel, navigation and some processes affecting all products and functions. New functionality may be introduced, subject to design decisions. There are also likely to be consequential impacts to reports and reporting.

5 Core proposition, narrative and key messages

5.1 Core proposition

A core proposition sits at the centre of our communications and engagement activity.

It illustrates the heart of what we want to convey to our people, customers, stakeholders and audiences. Our core proposition supports the reason for the transformation and will remain relevant for the lifetime of the transformation:

Making tax simpler, more open and certain for New Zealanders to pay their taxes and receive their entitlements.

5.2 Overarching narrative

We're making it simpler, more open and certain for New Zealanders to pay their taxes and receive their entitlements.

The wider benefits of our transformation include:

1. Making it easier for people to get things right and difficult to get wrong—and increasing voluntary compliance.

2. Ensuring continued collection of tax revenue.

3. Contributing to a growing, healthy economy.

4. Improving government's ability to make policy changes more quickly and cost-effectively.

5. Improving the resilience of the tax system.

5.3 Key messages

5.3.1 Key messages for Stage 4, Workstream 1

- This is the final stage of the Business Transformation Programme and the changes we're making will end system coexistence for all of our teams and give our people better access to information about our customers, meaning we'll be faster and more accurate in our processing.

- In time, these changes should allow customers to do more for themselves, freeing our people up to deal with more complex customer enquiries.

- Workstream one is called START Delivery – and there's three parts.

- The first involves moving the remaining products into START. To do this we're splitting the remaining products into two groups – an initial release in 2021 and a later release in October 2021.

- The second part includes supporting the Government's response to COVID-19, Budget initiatives and any other legislative changes we may need to implement

(some of which may not be implemented in START but will require changes to START Help).

- The third part is about improving aspects of the products and processes that we have delivered through our previous START releases. This is called Optimisation which will be led by the business who will select things that BT will implement.

- Some of the proposed changes require legislative amendments, and we expect these to be introduced to the house during 2020 or 2021. Some products may go live before the legislative changes are enacted, with policy and operational contingency plans in place. The key messages by product/service assume the relevant legislation will pass.

- On completion of Stage 4 there will be no more BT Programme! But change won't stop there. It will be ongoing, so we remain the modern world-class revenue organisation we've all created today.

5.4 Key messages by product/service

5.4.1 Unclaimed Monies

- We're making changes to Unclaimed Monies, which is money that is passed to the Crown when a business/organisation is unable to find the owner, after a period of time.

- From 2021, when the new legislation is enacted, it will be defined as an Inland Revenue Act so that Inland Revenue can use the information, we hold to find the owners of the money.

- We are changing the length of time before money is classified as "unclaimed" to five years (it is currently 6 years and, in some cases, 25 years).

- In some situations, where money remains unclaimed by a former client/customer the holder can transfer the money to Inland Revenue straight away.

- The threshold for transferring unclaimed monies remains at $100, but the Commissioner has discretion to accept smaller amounts.

5.4.2 New Zealand Foreign Trusts

- We are making some changes to the way New Zealand Foreign Trusts are administered.

- Moving away from paper forms and processes

- Moving to digital channels for providing and managing information

- Reducing manual handling and improving processing of information

5.4.3 Duties

- We are changing the way we administer duties.

- The move to START will enable digital channels for receiving and distributing information and money.

- We'll also automate processing of returns, payments, P&I, disbursements and reconciliation.

5.4.4 Paid Parental

- We're making some changes to Paid Parental Leave.

- Customers will be able to submit applications and update their circumstances via digital channels.

- It will also allow automated processing of applications, disbursements and monitoring to present overpayments.

5.4.5 Child Support

- We're making some changes to Child Support.

- Subject to legislation, we're removing the incremental penalty. This change will be made in FIRST as part of the Annual Changes project in April 2021 ahead of the second release.

- Moving Child Support into START will modernise and improve information sharing, online services, and self-management tools and deliver straight-through processing with fewer manual interventions, automating large transactional processes and providing a better integration of International Child Support into core systems.

- We'll also deliver legislative changes to improve fairness, simplify aspects of the scheme, improve compliance and deliver on Government goals to improve the wellbeing of children.

- It may include changes that affect some individuals, such as requiring some to start paying child support directly via their employer.

5.4.6 START Version 12

- We're upgrading START and myIR to version 12.

- The changes will include better functionality, enhanced security, a different navigational structure and a new look and feel.

- Part of the upgrade means myIR will look different and our people in frontline / customer facing roles will have to support customers during this transition.

6   Communications and engagement strategy

Effective engagement with our people remains just as important in this final stage of the programme. In this stage, we will transition new teams to the system, re-engage the wider IR audience to embrace the START and myIR upgrade and build pride and confidence in what has achieved for IR and its customers as the transformation programme closes.

- It is important that our people understand the key milestones of the programme lifecycle and how they can support those milestones. It is also imperative that we mirror our external customer campaigns internally, so our people can support our customers through the changes.

- In this release we're changing our approach to focus on the teams where change is relevant, so we'll create more focused communication for the first release rather than relying on the broadcast channels we have used in previous releases.

- In the second release, the v12 upgrade impacts a much wider audience and creates an opportunity for us to re-engage our people through our broadcast channels. This is not a new product, but rather an upgrade so we will treat it as such accordingly.

- As this is the final stage of the Transformation, we're taking the opportunity to highlight people who have worked on the programme and gone back to the business to showcase their skills. We'll also be highlighting benefits that have been delivered through previous releases. These communications are designed to give people confidence that when the BT Programme winds up, there are a lot of people within the organisation who were part of the design and decision-making process.

6.1   Communications objectives

Successful communications provide both a proactive strategy and reactive treatments. At a broad level our communications objectives are:

- Decision-makers (members of boards, governance and reference groups) and influencers (leaders whose opinion and positive perception of the programme will contribute to its success) understand and support transformation and have continued confidence in BT's ability to deliver.

- Ensure our people feel confident that at the conclusion of the Programme, the organisation has the knowledge, experience and skills to use the tools and systems implemented by the BT Programme.

- Empower our people to help customers with a better understanding of the system.

- Ensure our people know what is being shared with customers and when, ahead of time.

- Ensure our people are sufficiently well informed, allowing them to go into their training in the best place.

- Everyone impacted by the START Delivery workstream knows what will change, the benefits of change to themselves and their customers, what they need to do differently and when.

- Communication risks are identified, managed and mitigated.

6.2 Communications approach

Our communications approach is in five parts:

6.2.1 Signpost where the information can be found

- Through the BT Intranet pages, we have created a great reference library of information that is very product specific. We need to consistently sign post this information so that people know where to find it.

6.2.2 Make transformation part of our everyday conversations

- Work with others to ensure transformation content is an integral part of BAU organisational activities including:

    o Conversations that people have with our customer-facing teams (with CCS-I and CCS-B).

    o Business unit newsletters, news stories and other internal content (with Internal Communications).

6.2.3 Create START advocates

- Support the BT team to be proud to work on the programme, and equip them with information and stories to support their interactions with people across IR.

- Support the key users to play more of a role pre go-live to proactively promote key features in START.

- Support our Product Owners and OCMT Team to deliver targeted business engagements with impacted teams to share the features and changes.

- Ensure every IR employee who plays a role within the programme – eg SMEs, developers, testers and workshop attendees - remains connected and informed throughout the final stage.

- Create opportunities for IR staff to engage with and understand the changes to START, such as, Open Homes and Regional People Leaders' Forums.

- Give our people the confidence to be advocates of START with our customers.

6.2.4 Actively support our leaders to lead and our unions to support.

- Where practical and desirable, tell leaders and unions first.

- Use the unions as BT advocates e.g. through BT Workshops and Updates.

- Enable and support leaders to have high-quality conversations with their teams.

- Support team leaders to lead and coach their people through the final stage of Transformation.

6.2.5 Demonstrate IR values

- Be customer-centric - Increase our agility. Be swift to respond to opportunities and be quick to change what isn't working.

- Continue to use business intelligence, measurement, feedback and what we've learned to inform our communications and engagement activities.

- Ensure we acknowledge diversity in our communications.

6.3 Communications channels

The final stage of Transformation requires a different approach to previous releases. Our people impacted by many of the changes work in discreet areas across the organisation and are easy to target directly. Also, the way the organisation works has changed since the COVID pandemic – with more flexibility around working from home. We need to ensure our channels are fit for purpose to address their changes.

In particular, we will focus on:

6.3.1 Business Engagements

- Our people impacted by many of the changes work in discreet areas across the organisation and are easy to target directly. This means much of the internal engagement and communications will be direct with the teams via the Product Owners and their teams. We'll support these engagements through the deep dive events and creating material as required.

- We will also identify these teams' existing or preferred channels to share information appropriately

6.3.2 Visual story telling

- Identifying opportunities to use video and multi-media to tell customer and staff stories.

- Continuing to provide collateral, like Meetings in a Box, to ensure consistent messaging for complex and important information.

6.3.3 Digital engagement

- Develop new ways to engage our people through Base Configuration Verification sessions, Regional People Leaders' Forums and Open Homes, this year being conducted mainly online.

- Continue to point impacted teams to the BT intranet pages as the single source of truth for the changes.

- Leverage the opportunities afforded by digital channels and make the most of the BT intranet, Yammer and Teams spaces.

6.4 Channels and Tactics

Tactic	Focus of tactic	When
Channels for Leaders BT channels will be used to communicate core information around START Delivery.		
BT Leaders Update	Sets the narrative for the month, outlining key points that leaders need to know and can take away and share with their teams, including introducing new terminology.	Second Thursday of every month
BT Monthly Info Pack	Contains the key messages and builds on the themes introduced in the Leaders Update. The BT Monthly pack will be distributed to BTMs, Customer Segment Leads, Group Managers, Product Owners and key users, to share up-to-date information on BT progress.	Third week of every month
Open Homes	Used to test change impacts and ensure they capture what will be different, and to educate attendees. These will be run online for Stage 4 and there will be two, one for each release.	August 2020 and May 2021
People Leaders' Forum	To help leaders understand the change and to provide the tools and information required to lead their people through the final stages of Transformation, and other topics. This will be run online this year.	October
People Leaders Messages	Used to give leaders a heads up about what's coming, reminders or information they need to share with their teams. These have moved to weekly and there is also an opportunity for any urgent messages to be sent out of cycle.	As required
Attendance at Leadership Meetings	With the smaller teams impacted, there is more opportunity to present to leadership teams around the changes. This has already started happening.	

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Business Transformation

Channels for all our people		
The following channels are for all our people.		
Transformation News	Designed to reinforce the messages that have been delivered by leaders from the BT Leaders Update and the BT Monthly Info Pack.	Fourth week of every month
Deep dive Updates (webinars)	These are used to provide further detailed information about specific topics. They are presented by subject matter experts and accompanied by a detailed presentation and question and answer session.	As required
Videos	Videos have been used with great success in previous releases. We will continue to use them, where appropriate – to highlight senior-level endorsement, to give messages clarity or bring them to life and to signpost more formal communications on the intranet or other media, eg 'Day in the life' videos.	As required
Virtual Chat with Greg	Virtual chat with Greg sessions will be offered to staff in various locations to reconfirm the why and the benefits of this transformation and support ongoing change eg the upgrade to version 12.	TBC
Meeting in a box	Used when there is technical information and it would help the leader to have prompts to aid team discussion. Where possible, an activity is provided to help embed the message.	As required
BT Intranet	Used by our people as the internal 'single source of truth', information will be created and added to regularly.	From June and updated regularly, as required
START Delivery Infographic	Like Releases 2 and 3, we will create an infographic to help explain the scope of START Delivery.	One-off

Channels for all our people
The following channels are for all our people.

Business Engagements	Given the size of the impacted groups for this release, there will be opportunities to hold information sessions and engagements regarding the changes.	
Featured News	Used whenever there is critical information to share with all IR people. It is the most read existing IR internal communications channel.	As required
Yammer / Teams	Yammer has been used with success in previous releases (particularly for competitions). We will explore how we might continue to use this, and Team channels complement existing channels.	As required
Posters	As with previous releases, there is an opportunity to attract attention through posters.	As required

Other

Unions – Teams events, workshops and national union meetings	Unions are kept up to date with progress through monthly teleconferences and attendance at national union meetings. When required, workshops are also held.	Monthly – Teams Event Workshops – 3 per annum – August/Sept, February June/July.
BAU communications channels	A range of newsletters are produced by different areas of the business and we'll also work with the internal communications team to access the CCS channels.	

7   Risks and Mitigations

Risks	Mitigations
This is the final stage of Business Transformation and the changes will occur over an 18-month period, which requires us to keep people's attention for a longer period. There is potential for change fatigue.	Remind our people about what we are doing and why and then take a light touch approach when we don't need their attention. Provide a recap of what's been achieved so far and the benefits – both to them and to our customers - of the changes that are coming. Provide case studies of how we've reduced re-work, improved compliance reduced the cost of compliance and made it simpler for customers.
Many of the changes impact specialist teams, meaning that we can do targeted communications. However, there is a risk that if the business decides to assign different teams to that work, then people may not be as prepared as their colleagues.	Ensure that we publicise opportunities for people to attend our deep dive sessions and promote transformation news and the BT Intranet pages as a source of information.
Changes to the organisation through He Kōtuitui and the Future Operating Model will occur during this last phase of transformation and are likely to distract and compete for staff attention, creating challenges in achieving cut-through.	Work collaboratively with the He Kōtuitui team and the Internal Communications team to understand impacts and avoid communications congestion, using the Executive Communications Group to escalate concerns.

8   Measurement

It is essential that we measure what we do, and set targets for the future, giving us the ability to adapt plans.

Below is a table setting out each objective and how it will be measured:

Communications objective	Measurement
Decision-makers and influencers understand and support the transformation and have confidence in BT's ability to deliver.	Feedback from engagements with CCS leadership team Union feedback through monthly Teams Updates.
Stakeholders and those who work at IR feel they have been engaged and involved in transformation and understand and support the need for change.	Internal Channel survey. Yammer/Teams Survey. Readership of BT content on IR intranet, BT intranet and People Leaders Space. Subscriptions to internal Transformation News. BT Leaders' TEAM event attendance and feedback. Feedback from BT events including Open homes, Regional People Leaders' Forum. Comments and questions on IR intranet and BT inbox.
Everyone impacted by the changes, both internally and externally, knows what will change, the benefits to them and their customers, what they will need to do differently and when.	Internal Channel survey. Business and people readiness survey (run in lead up and just after go-live).
Communications risks are managed and mitigated.	Measured as per BT Risk Register in JIRA.

Inland Revenue
Te Tari Taake

Business Transformation

Appendix 1: Business Transformation START Delivery Workstream plan

[UNCLASSIFIED]

Stage 4: Internal communications plan on a page

2020	JUL-AUG	SEP-OCT	NOV-DEC	2021 JAN-FEB	MAR-APR	MAY - JUN	JUL-AUG	SEP-OCT	NOV-DEC
	Awareness	Understanding	Readiness	Support					
				Awareness		Understanding	Readiness		Support

KEY MILESTONES

- BST starts
- WFFTC backdated payments
- Mock go-live 1
- SBS starts / SBS 2 starts
- Mock go-live 2
- BST starts
- New Legislation effective
- Go-Live (Release 2)
- SBS starts
- Mock go-live 1 / Mock go-live 2 / Mock go-live 3
- Go-Live

1 Readiness checkpoint
2 Readiness checkpoint
3 Readiness checkpoint
Training starts

Release 1 / **Release 2**

All leaders

BT Leaders Update

| July: | Aug: Stage 4, Exit of ELS, Haukainga, Atea, FIRST user access | Sept: Go-live date for first release, Atea, Intel Led, Open Homes plug, Decommissioning | Oct: Atea, Intel led, Training, Decommissioning | Nov: V12 update, BST, Readiness checkpoint, Atea, Intel Led | Dec: Mock go-live 1, Atea, Intel led, WFFTC backdated payment | Feb: ELS, Readiness checkpoint, Shut down, Day 1 Information | Mar: Pou Whirinaki, V12, Atea, Intel Led, New Legislation | April: New Legislation, Pou Whirinaki, V12, Atea, Intel Led | May: V12, Confirm go-live date, Child Support, Decommissioning, Intel led | Jun: V12, Child Support, Training, Intel led, Decommissioning | Jul: Training, V12, Intel led, Atea, Decommissioning | Aug: Mock go-live 1, SBS, Decommissioning, Intel Led, Atea | Sept: Deployment, Customer comms, Intel led, Atea, Decommissioning | Oct: Deployment, Readiness, Pou Whirinaki |

Monthly Info Pack — Updated monthly, available on BT intranet – summary of key points from BT Leaders Update, work stream updates, responding to staff feedback etc.

People leader Brief — As required

Business Engagements

Targeted face to face engagement with leadership and impacted teams

- Solution Design Review – Foreign Trusts
- Solution Design Review - PPL
- Open Home
- Base configuration verification
- Union Workshop
- Union Workshop
- Union Workshop

Staff

Early Life Support – daily/weekly updates
Early Life Support – daily/weekly updates

Yammer Campaigns
- #endgame Campaign- Introducing the people working on Stage 4
- #Stage 4 – setting the scene
- #reSTART Campaign- helpful hints and tips about START

Deep Dive Updates

| | Oct: Unclaimed monies, Foreign Trusts | Nov: Paid Parental Leave, Duties | | Feb: Legislation | | May: v12 | Jul: Child Support | |

Segment Newsletters

| Families Segment – Stage 4 launch | Individuals Segment – Plug the deep dives | Families Segment – Plug the PPL deep dive | All Segments – Plug the Leg deep dive | | All Segments – Plug the v12 deep dive | Families Segment – Plug the Child Support deep dive |

Videos & Meeting in a box & Events
- Setting the Scene / Setting the scene
- Regional People Leader Forums
- V12 Roadshow
- Day in the life – Child Support

BT intranet
- Update as required
- Setting the Scene added
- Setting the Scene material
- Add Unclaimed monies and foreign trusts deep dive info
- Add PPL and duties deep dive info
- Add Legislation Information
- ELS Material

IR Intranet news

| BT to BAU series | Go-live date comms | BT to BAU series | Unclaimed monies, Foreign Trusts | BT to BAU series | Paid Parental Leave Duties | BT to BAU series | Mock go-lives, WFFTC backdated payments | Readiness checkpoint results, BT to BAU series | Decision to proceed, BT to BAU series | Go-live comms, Legislation Update | BT to BAU series | BT to BAU series | BT to BAU series | BT to BAU series | BT to BAU series | BT to BAU series | BT to BAU series |

Transformation News

| August: Special Edition – Stage 4, Go-live date, Atea, Intel Led, Decommissioning | Sept: Open Homes, Decommissioning, Upcoming deep dives, Intel Led | Oct: ReSTART Campaign, BST, Training, Atea, Intel Led | Nov: Readiness checkpoint, Countdown to go-live, Intel Led, Atea, Decommissioning | Jan: Readiness checkpoint, Mock go-live 1, SBS, Intel Led | Feb: Get ready for go-live, Decommissioning, Intel Led | March: Pou Whirinaki, Looking forward, Intel Led, Decommissioning | April: V12, Pou Whirinaki, Child Support | May: V12, Child Support, Decommissioning, Intel Led, Atea | June: V12, Child Support, Decommissioning, Intel Led, Atea | July: V12, Child Support, Intel Led, Atea | Aug: V12, Child Support, Readiness checkpoint | Sept: V12, Child Support, Readiness checkpoint, Mock go-lives | Oct: Pou Whirinaki |

Day one Information
Day one Information

Cutover comms – Targeted Comms: what's happening over go-live
Cutover comms – Targeted Comms: what's happening over go-live

Deployment comms – Targeted Comms: actions to be ready for go-live
Deployment comms – Targeted Comms: actions to be ready for go-live